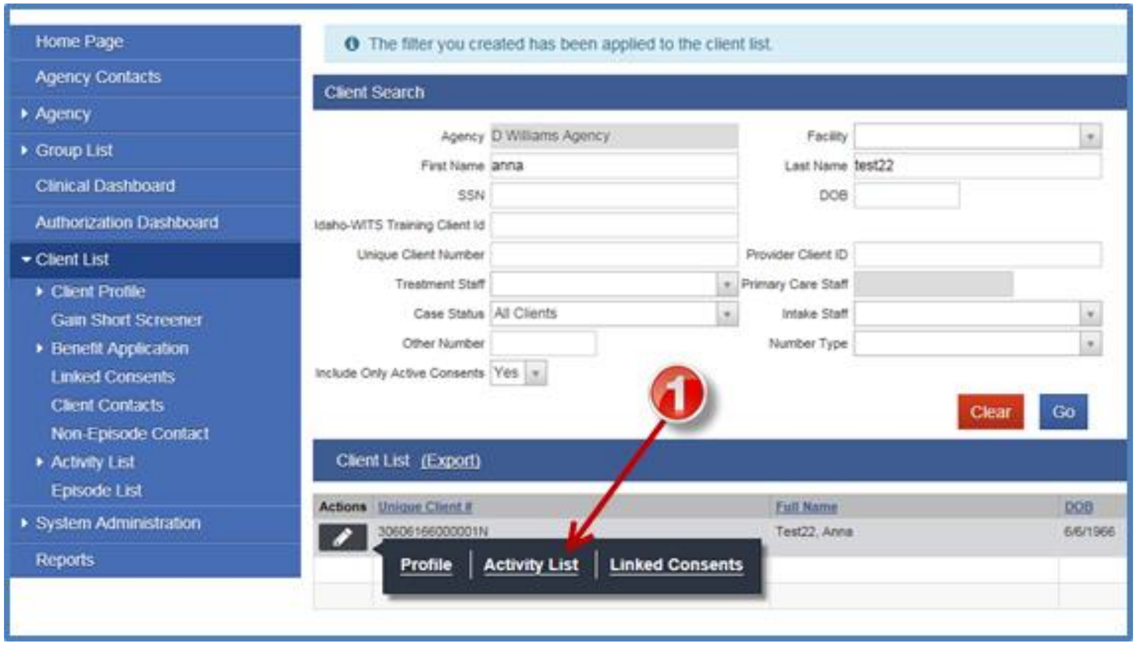
Creating and Billing Unsuccessful Follow Up Attempts for DHW and IDJC Clients

NOTE:

- **Clients must sign an informed consent specific to outcome data collection located on the WITS website**.
- **Do not complete a Follow Up for an ATR funded client.**
- **An Authorization is not required to bill for the Follow Up Survey.**

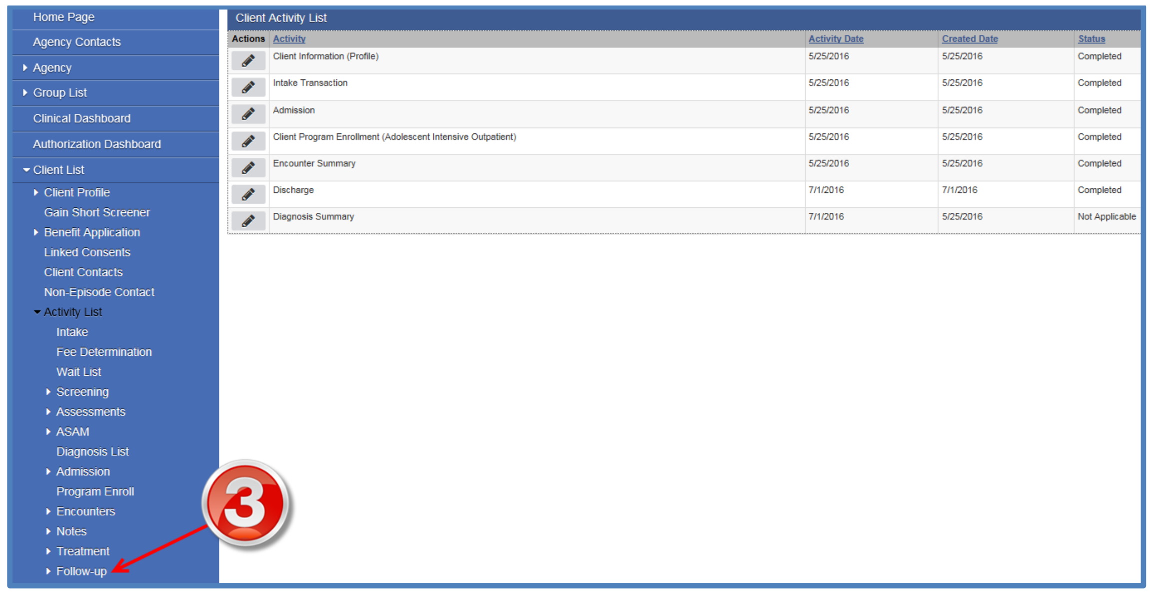
Complete an Unsuccessful Follow Up

1. **Getting here:** Login, click **Client List** on the Navigation Pane (left menu) to generate the Client Search Screen, locate the client name and hover over  under Actions and click **Activity List**.



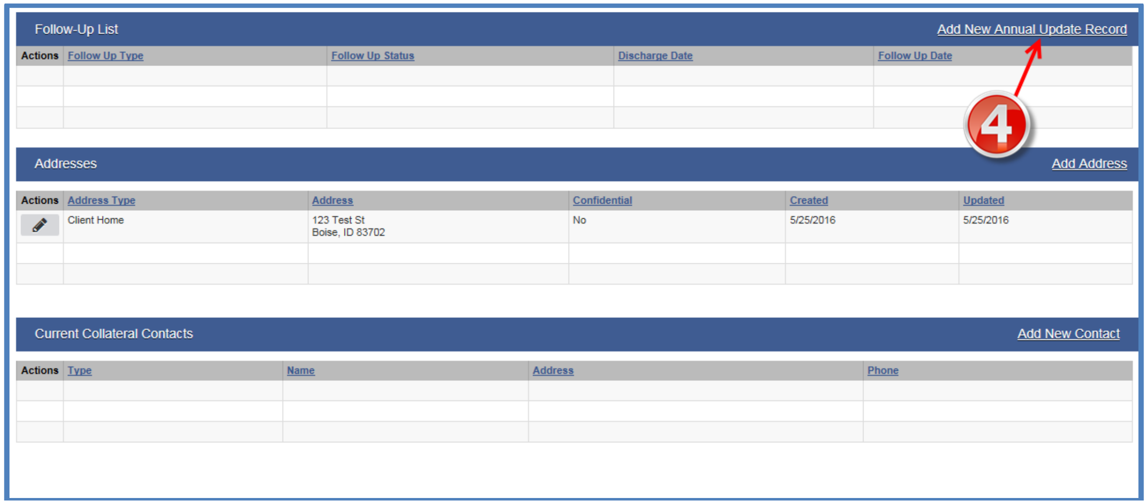
2. Hover over  under Actions and click **Review** to review the Episode of Care.

3. Click **Follow Up** on the Navigation Pane (left menu) under the Activity List.



NOTE: Update all contact information for the client as applicable.

4. Click **Add New Annual Update Record**.



5. Select the **<u>Follow Up Type</u>** and the **<u>County of Residence</u>**.

6. Select a **<u>Follow Up</u>** Status from the list below indicating why the Follow Up survey was not completed:

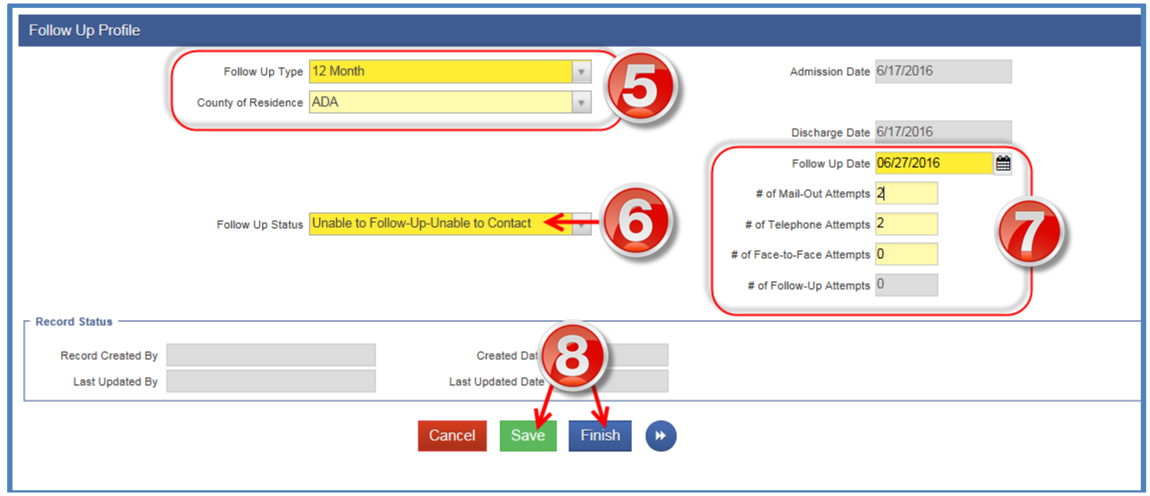
- **<u>Unable to Follow-Up-Awaiting Response</u>**
- **<u>Unable to Follow-Up-Incarcerated</u>**
- **<u>Unable to Follow-Up-Transferred</u>**
- **<u>Unable to Follow-Up-Unable to Contact</u>**

7. **<u>Complete all fields.</u>**

NOTE: Create four (4) unsuccessful attempts to contact client, each attempt must be conducted on separate days. Documentation for each attempt will be recorded on the Activity List as a Follow Up attempt in a completed status. Once the fourth unsuccessful attempt is complete, you may proceed to bill for the unsuccessful attempts.

8. Click Save and Finish.

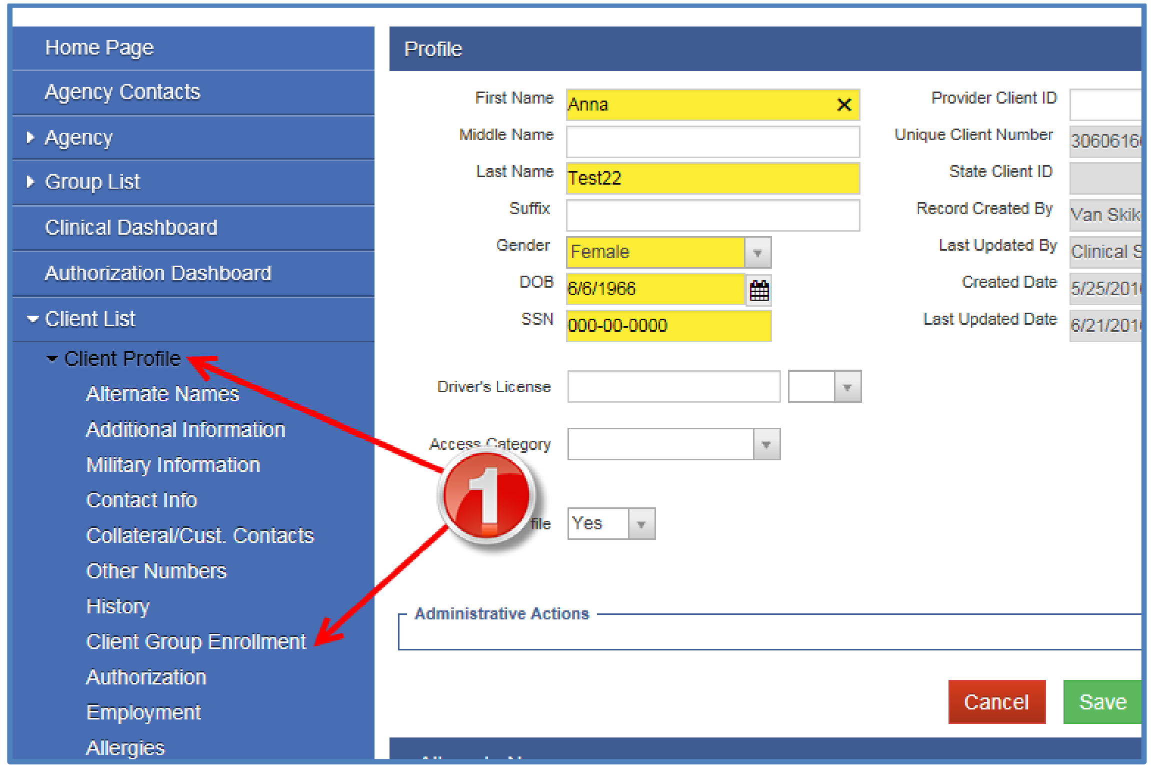
NOTE: When there are 3 Follow Ups with the status of Unable to Follow-Up (Awaiting Response) and a 4th Follow Up is entered with a status of Unable to Contact, WITS will automatically open the Intake and create the Follow Up Program Enrollment.



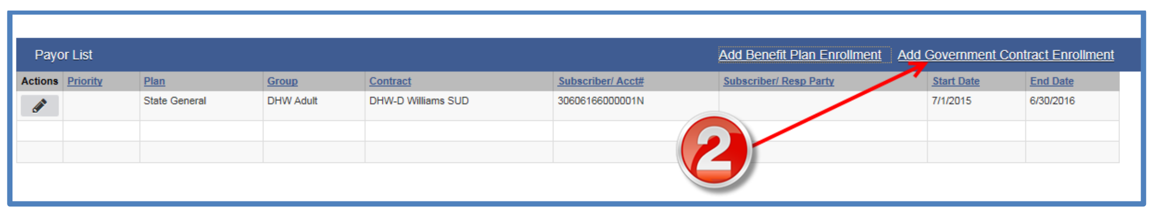
Create a Client Group Enrollment

1. Click **Client Profile** and **Client Group Enrollment** on the Navigation Pane (left menu).

NOTE: Create a new Client Group Enrollment each time you are billing for a 4^{th} Unsuccessful Follow Up with a status of Unable to Contact.



2. Click **Add Government Contract Enrollment**.

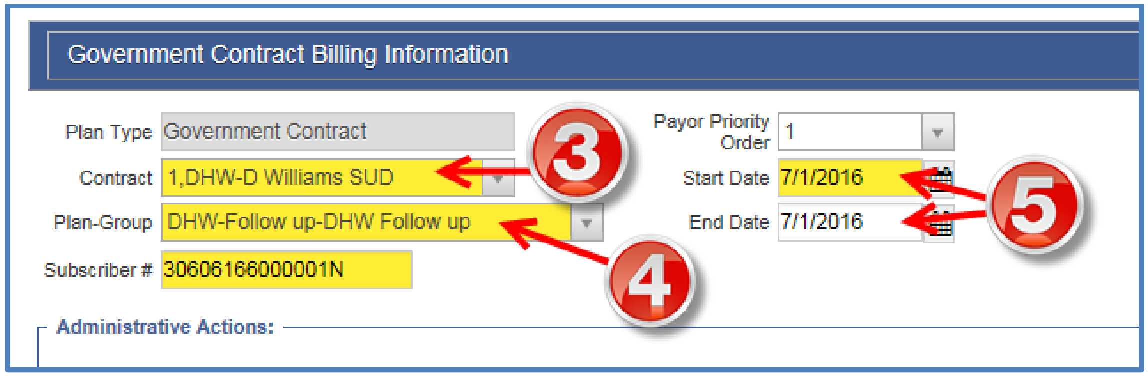


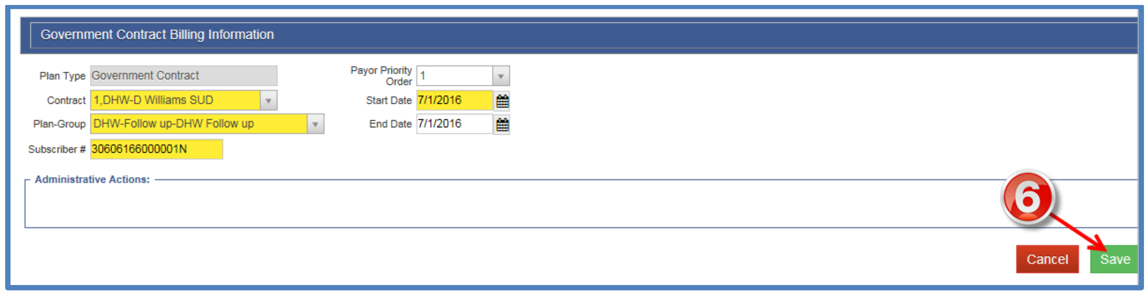
3. **<u>Select the Contract that starts with “DHW” or “IDJC” followed by your agency name</u>** (whichever is applicable.)

4. Select **<u>DHW Follow up or IDJC-Follow Up</u>** as the **<u>Plan Group.</u>**

5. **<u>Enter the day you completed the Follow-Up as the Start and End Date</u>**.

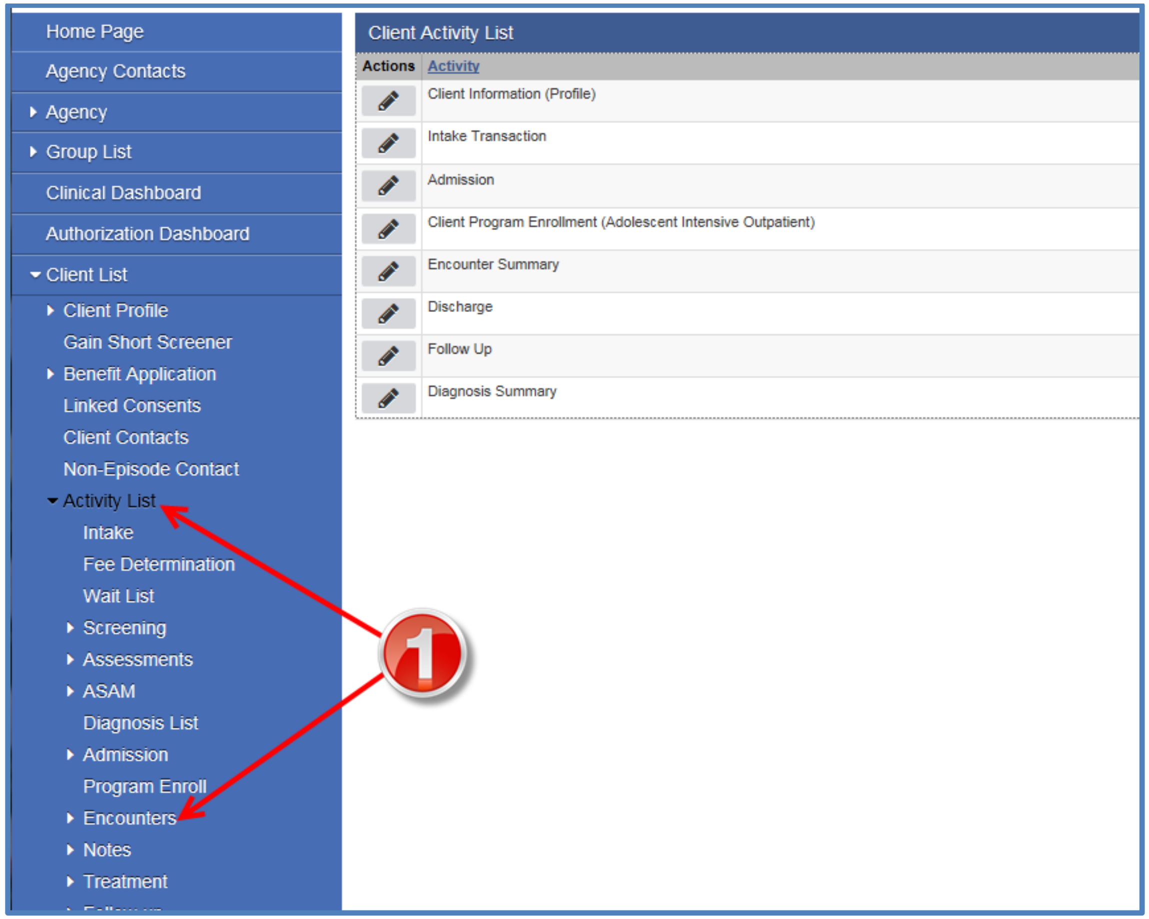
6. Click .



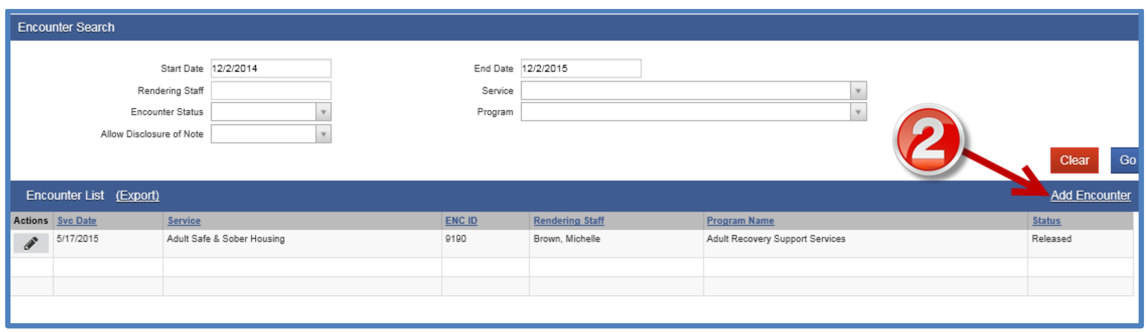


Bill for Unsuccessful Follow Up Survey Attempts (Create an Encounter)

1. Click **Activity List** and **Encounters** on the Navigation Pane.



2. Click **Add Encounter**.



3. Complete the following:
   - Select **Follow Up** as the **Note Type**
   - Select the **Service** of **Follow Up 30-Day Attempts Unsuccessful**, **Follow Up 6-Month Attempts Unsuccessful**, or **Follow Up 12-Month Attempts Unsuccessful**
   - Enter the **Start Date**
   - Select the **Service Location**
   - **Enter 1** for the **# of Service Units/Sessions**.

4. Click 

and 
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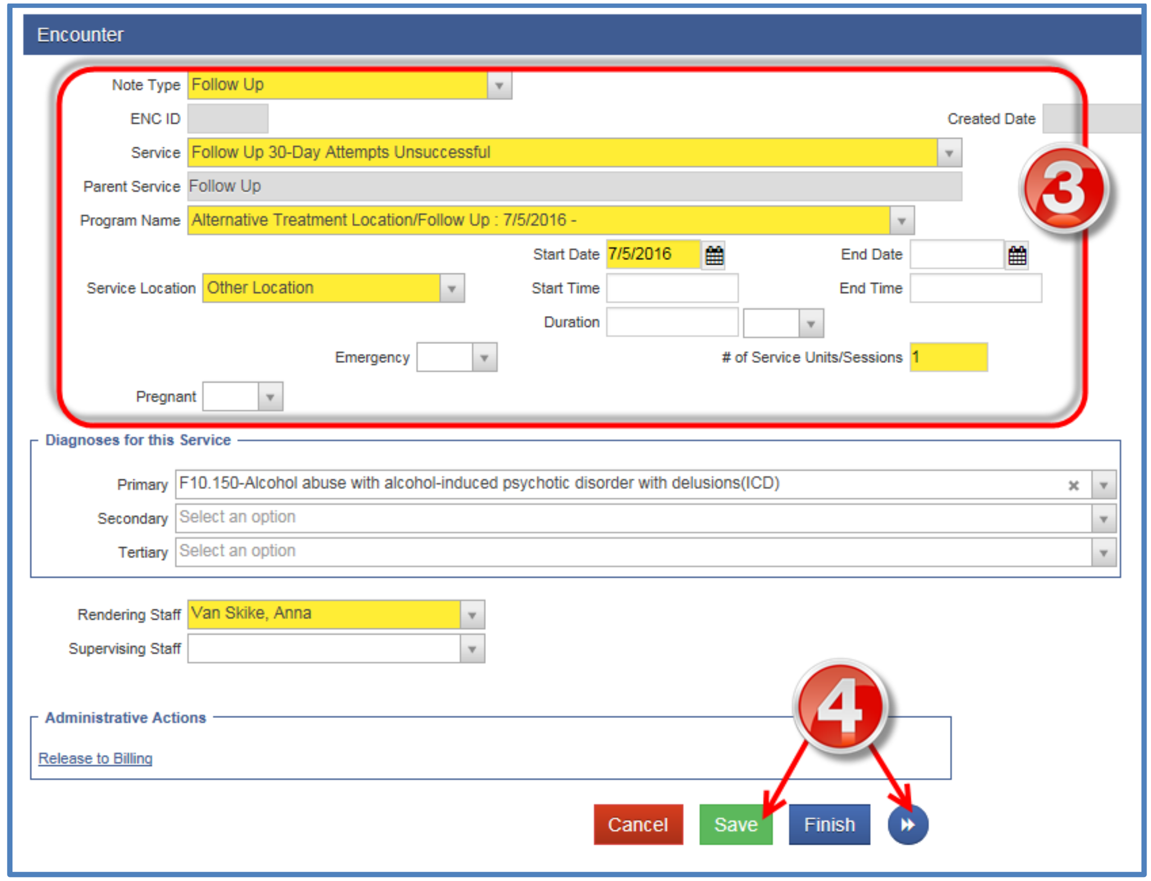


5. **Enter a note** in the Unsigned Note section.

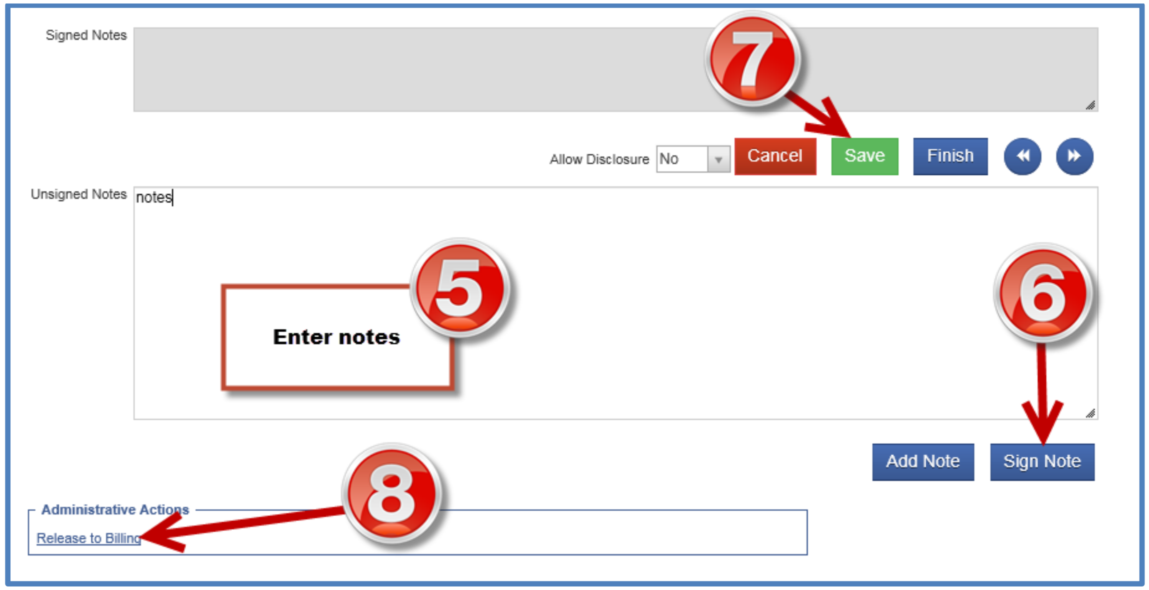
NOTE: Document the four methods used to attempt to contact client.

6. Click **Sign Note**.

7. Click **Save**.

8. Click **Release to Billing**.

NOTE: When the Encounter Releases to Billing, WITS will prompt you to close the case (Intake).



9. Select **Yes** when prompted to close the case.

NOTE: WITS will automatically close the Follow Up Program Enrollment when the Intake is closed.